

What is claimed is:

- 1 1. A system for managing information disclosure statement (IDS)
2 references, comprising:
3 a computing system;
4 a first software component operable on the computing system to generate
5 a plurality of IDS forms; and
6 a second software component operable on the computing system to
7 manage IDS references for at least one organization;
8 wherein each organization only has access to its own IDS references.
- 1 2. The system as recited in claim 1, further comprising:
2 a third software component operable on the computing system to provide
3 a presentation for managing the IDS references associated with each matter of
4 the at least one organization.
- 1 3. The system as recited in claim 2, further comprising:
2 a fourth software component operable on the computing system to
3 manage matters for the at least one organization;
4 wherein the second software component is a part of the fourth software
5 component.
- 1 4. The system as recited in claim 3, further comprising:
2 a fifth software component operable on the computing system to manage
3 activities within matters;
4 a sixth software component operable on the computing system to manage
5 organizations;
6 a seventh software component operable on the computing system to
7 manage tasks within matters;
8 an eighth software component operable on the computing system to
9 provide communications; and

1 a ninth software component operable on the computing system to provide
2 security;

3 wherein the third, fourth, fifth, sixth, seventh, eighth, and ninth software
4 components are capable of interfacing with the first and second software
5 components in a patent prosecution enterprise application.

1 5. The system as recited in claim 1, wherein the IDS references comprise:
2 an IDS holder;
3 an IDS patents holder related to the IDS holder;
4 an IDS publications holder related to the IDS table; and
5 an IDS source holder to indicate how to access the stream of data
6 associated with each IDS reference.

1 6. The system as recited in claim 5, further comprising:
2 a matter holder related to the IDS holder; and
3 an organization holder related to both the IDS holder and the IDS source
4 holder.

1 7. The system as recited in claim 6, further comprising:
2 a database management system to manage the holders.

1 8. The system as recited in claim 7, wherein the holders are tables and the
2 data management system is a relational database management system.

1 9. The system as recited in claim 8, wherein the holders are classes and the
2 data management system is an object-oriented database management system.

1 10. A method for reporting, comprising:
2 receiving a report specification;
3 interpreting the report specification;
4 generating an answer file;

1 receiving a plurality of transformations to act on the answer file and a
2 form definition file; and
3 providing a report.

1 11. The method as recited in claim 10, wherein the report is an information
2 disclosure statement (IDS) form.

1 12. The method as recited in claim 10, further comprising:
2 receiving a question file;
3 wherein interpreting the report specification includes reading the
4 question file.

1 13. A method for managing information disclosure statement (IDS)
2 references, comprising:
3 receiving a request to add an new information disclosure statement (IDS)
4 reference to a first matter;
5 searching for all matters related to the first matter; and
6 adding the new IDS reference to selected matters related to the first
7 matter.

1 14. The method as recited in claim 13, further comprising:
2 selecting only those matters related to the first matter with a matter type
3 that supports IDS reference management and only those matters having an
4 appropriate stage.

1 15. The method as recited in claim 13, further comprising:
2 presenting a list of IDS references for a second matter, wherein the
3 second matter is related to the first matter; and
4 indicating the new IDS reference in the list originated in the first matter.

1 16. The method as recited in claim 15, further comprising:

1 indicating the new IDS reference is unmarked and unreviewed.

1 17. A system for managing information disclosure statement (IDS)
2 references, comprising:

3 a computing system;

4 a presentation layer operable on the computing system to present an
5 information disclosure statement (IDS) reference inventory system;

6 a business logic layer operable on the computing system to manage the
7 IDS reference inventory system and to generate IDS forms; and

8 a data layer operable on the computing system to manage the data
9 associated with the IDS reference inventory system.

1 18. The system as recited in claim 17,
2 wherein the computing system comprises:

3 a web server;

4 at least one browser in communication with the web server; and

5 a file system accessible to the web server;

6 wherein the presentation layer, the business logic layer, and the data layer
7 operate on the web server.

1 19. The system as recited in claim 17,
2 wherein the computing system comprises:

3 a web server;

4 at least one browser in communication with the web server; and

5 a database management system accessible to the web server;

6 wherein the presentation layer and the business logic layer operate on the
7 web server and the data layer operates on the database management system.

1 20. The system as recited in claim 17,
2 wherein the computing system comprises:

3 a web server;

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1 at least one browser in communication with the web server;
2 an application server in communication with the web server; and
3 a database management system in communication with the
4 application server;
5 wherein the presentation layer operates on the web server, the business
6 logic layer operates on the application server, and the data layer operates on the
7 database management system.

1 21. A computer-readable medium storing computer-executable instructions
2 for performing a method, the method comprising:
3 providing a presentation capable of associating at least one information
4 disclosure statements (IDS) reference to at least one matter; and
5 providing a presentation capable of listing each IDS reference associated
6 with each matter.

1 22. The method as recited in claim 21, further comprising:
2 providing a presentation capable of generating an IDS form for at least
3 one matter.

1 23. The method as recited in claim 21, further comprising:
2 providing a presentation capable of modifying at least one IDS reference
3 associated with at least one matter.

1 24. The method as recited in claim 21, further comprising:
2 providing a presentation capable of deleting at least one IDS reference
3 associated with at least one matter.

1 25. The method as recited in claim 21, further comprising:
2 providing a presentation capable of searching all IDS references
3 associated with one matter.

- 1 26. The method as recited in claim 21, further comprising:
2 providing a presentation capable of searching all IDS references owned
3 by one organization.
- 1 27. The method as recited in claim 21, further comprising:
2 providing a presentation capable of marking at least one IDS reference
3 associated with at least one matter.
- 1 28. The method as recited in claim 21, further comprising:
2 providing a presentation capable of updating a review status of at least
3 one IDS reference associated with at least one matter; and
4 providing a presentation capable of showing the review status of each
5 IDS reference associated with at least one matter.
- 1 29. The method as recited in claim 21, further comprising:
2 restricting access to IDS references so that each organization only has
3 access to its own IDS references, unless an individual from a first organization is
4 invited into a matter of a second organization.
- 1 30. The method as recited in claim 21, further comprising:
2 providing an accounting system to track costs associated with storing
3 IDS references.
- 1 31. The method as recited in claim 21, wherein
2 presentation capabilities for each individual are determined based on
3 their role in a matter and an organization associated with each individual.
- 1 32. The method as recited in claim 21, further comprising:
2 providing a presentation capable of uploading a stream of data associated
3 with the at least one IDS reference.

1 33. The method as recited in claim 32, further comprising:
2 providing a presentation capable of downloading the stream of data
3 associated with the IDS reference.

1 34. The method as recited in claim 32, further comprising:
2 providing links for various applications capable of opening and
3 displaying the stream of data.

1 35. The method as recited in claim 21, further comprising:
2 providing a presentation capable of uploading a plurality of streams of
3 data associated with IDS references, the IDS references being associated with a
4 plurality of matters.

1 36. A system, comprising:
2 a host organization managing a plurality of matters; and
3 a plurality of attorneys some of which belong to different law firms
4 associated with the plurality of matters;
5 wherein a first set of attorneys of the plurality of attorneys are associated
6 with a first law firm and have access to selected matters in the plurality of
7 matters, but have no access to other matters in the plurality of matters;
8 wherein attorneys other than those in the first set of attorneys are
9 associated with at least one law firm other than the first law firm and have access
10 to matters other than the selected matters;
11 wherein a reference associated with one of the selected matters is
12 propagated to a new matter that is not in the selected matters;
13 wherein the attorneys other than those in the first set of attorneys do not
14 have access to the new matter.